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1 2	STATE OF MONTANA REPORE THE BOARD OF PERSONNEL APPEALS	
3	IN THE MATTER OF UNFAIR LABOR PRACTICE NOS. 19 and 22-80:	
4	HUNTLEY PROJECT EDUCATION) ASSOCIATION,)	
5	Complainant in No. 19-80) Defendant in No. 22-80,)	
6	- vs -	FINAL ORDER
8	YELLOWSTONE COUNTY SCHOOL) DISTRICT NO. 24,	
9	Complainant in No. 22-80) Defendant in No. 19-80.	
10		
12	No exceptions having been filed, pursuant to ARM 24-26-215.	
13	to the Findings of Fact, Conclusions of Law and Recommended	
14	Order issued on February 27, 1981;	
15	THEREFORE, this Board adopts that Recommended Order in this	
16	matter us its FINAL ORDER.	
17	DATED this A day of April, 1981.	
18	BOARD OF PERSONNEL APPEALS	
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20	John Allay	
21	HARRAGE AAAAAAAAA	
23	CERTIFICATE OF MAILING	
24	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
25	to the following on the 6 day of April , 1981:	
26	Emilie Loring HILLEY & LORING, P.C.	Boris Poppler DAVIDSON, VEEDER, BAUGH, BROEDER
27	Executive Plaza - Suite 2G 121 4th Street North	g POPPLER, P.C. Suite 805 - First Bank Duilding Billings, MT 59101
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STATE OF MONTANA

BEFORE THE BOARD OF PERSONNEL APPEALS

In the Matter of Unfair Labor Practices Nos. 19 and 22-80:

HUNTLEY PROJECT EDUCATION ASSOCIATION

Complainant in No. 19-80, Defendant in No. 22-80,

VS.

FINDINGS OF FACT, CONCLUSIONS OF LAW; AND RECOMMENDED ORDER

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YELLOWSTONE COUNTY SCHOOL DISTRICT NO. 24,

Complainant in No. 22-80,) Defendant in No. 19-80.

* * * * * * * * * *

1. INTRODUCTION

On May 23, 1980 the Huntley Project Education Association filed an unfair labor practice charge against Yellowstone County School District No. 24 alleging that the District: (1) violated 39-31-401(1), (2) and (3) MCA by interfering with protected employee rights, by interfering with the administration of the labor organization and by discriminating against an employee because of her union activities; (2) violated 39-31-401(1), (2) and (3) MCA by placing that employee on probation because she called a union meeting; (3) violated 39-31-401(5) MCA by refusing to abide by a collective bargaining agreement; and, (4) yielated 39-31-401(1) end (2) MCA by adopting a nolicy requiring teachers to seek District approval before accepting an Association office. The School District answered on June 9, 1980 and denied all allegations. On June 15, 1980 the District filed unfair labor practice charges against the Association. It alleged the following violations: (1) 39-31-402(2) MCA by interfering with protected employer rights under 39-31-303(1), (4), (5) and (7) MCA when an employee engaged in an unauthorized

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evaluation of one of the District's principals; (2) 39-41-402(1) MCA by coercing and harassing one of the District's principals; and, (3) 39-31-303(1), (4), (5) and (7) and 39-31-402 MCA by interfering with protected employer rights by conducting an unauthorized evaluation of a principal and failing to bargain in good faith. The Association filed its answer on June 27, 1980 and denied the allegations. On motion of the parties both charges were consolidated on June 20, 1980. A hearing was held in Worden on September 5, 1980 at which the Association was represented by Emilie Loring and the District by Doris Poppler.

II. ISSUES

- 1. Did the School District violate 39-31-401(1), (2) or (3) MCA by reprimanding and placing on probation teacher Knippel because she called two meetings of teachers and distributed an evaluation form to teachers to evaluate their principal?
- 2. Did the School District violate 39-31-401(5) MCA by requiring that Association use of school buildings for meetings be approved by each principal as well as the principal of the building to be used?
- 3. Did the School District violate 39-31-401(1) or (2) MCA by adopting a policy which requires teachers to seek its approval for time off prior to accepting an Association office?
- 4. Did the Association violate 39-31-402(2) MCA by the action of teacher Knippel in distributing the evaluation form? Did such action interfere with District rights under 39-31-303(1), (4), (5) or (7) MCA?
- Did the distribution of the evaluation form constitute a violation of 39-31-402(1) MCA?
 - 6. Did the calling of the meeting by teacher Knippel



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interfere with employer rights under 39~31-303(1), (4), (5) or (7) MCA and violate 35-31-402 MCA?

Is this the proper forum for hearing these charges? PINDINGS OF FACT

Based on the evidence on the record including the sworn testimony of witnesses, I find as follows:

- The Huntley Project Education Association affili-1. ated with the Montana Education Association is the exclusive representative for purposes of collective bargaining for all teachers of Yellowstone County School Bistrict No. 24 Worden who are certificated in Class 1, 2, 4 or 5 under state law. Mary Knippel is one of those teachers.
- 2 . Ms. Enippel has worked as an elementary teacher for the District for eleven years. She has been active in the Association for approximately eight years and has been its president for about the last six years. She also has been an Association delegate and has been on the negotiating team for most of her eleven years of employment with the District. The District knows she is a union activist.
- The District's physical plant is comprised of 30 three major buildings, all within close proximity of each other, an elementary building, a junior high building and a high school building. Ms. Knippel works in the elementary school in which Sillie Strissel is the principal. Ms. Strissel has held that position for the last two school years. Calvin McRse is the Superintendent of the District and as such is the administrator in charge of carrying out District policy set by the Board of Trustees.
- There are approximately 16 teachers in the elementary school. The basic duty hours are from 8:00 a.m. until 4:00 p.m. The time from 8:00 to 8:15 a.m. and from 3:30 to 4:00 p.m. is preparatory time or time for faculty meetings.

Only the Superintendent or a principal has authority to call a faculty meeting. At 8:15 a.m. teachers are required to be in their classrooms. Students leave at 3:30 p.m. Whenever a teacher leaves the building during the duty day he or she is expected to obtain permission of the principal.

- 5. Regular monthly Association meetings are held at 3:45 p.m. in the high school building. The high school principal is notified of the meeting. Other principals are usually not notified.
- 6. On April 16, 1980 Ms. Knippel called a special sceting of the Association for 3:45 p.m. in the high school building. She notified the high school principal but did not notify the principals of the other two buildings. District policy requires that teachers not leave the building to which they are assigned during the basic duty day unless they first make arrangements with their principal.
- 7. On April 18, 1980 Ms. Knippel called a meeting of elementary teachers in her classroom at 8:00 a.m. The purpose of the meeting was to air grievances some of the teachers had against principal Strissel. There were personal ill feelings between Ms. Knippel and Ms. Strissel. The meeting lasted until 8:25 a.m. and was held without permission of the elementary principal or the superintendent. At least one of the elementary teachers who was invited to attend the meeting was not a member of the association and had not been invited to attend previous association meetings. Only elementary teachers attended, teachers from the other schools were not invited. Ms. Knippel knew when the meeting went beyond the proper time it was a violation of school policy.
- On the same day, after the April 18, 1980 meeting,
 Mr. McRae met with Ms. Knippel and Ms. Strissel. Knippel

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told him that the April 18th meeting was not an Association meeting. She believed it would have been harder in the future to hold meetings at 3:45 p.m. McRae informed her that he was going to put a letter in her personnel file. The following letter, dated May 2, 1980, from McRae to Knippel was placed in her file:

An MEA meeting was called by Ms. Knippel and held at 3:45 p.m. on Wednesday, April 16, 1980. Only the High School Principal was asked. The Junior High and Elementary Principals were not notified or asked if an MEA meeting could be held during school time. In the future all MEA meetings must be held outside of school time or clearance for an MEA meeting must be obtained from each principal to have a meeting on school time.

Ms. Knippel called an Elementary Faculty meeting for the morning of April 18, 1980 in the faculty room and kept the staff past 8:15 g.m. Two things are wrong here:

- No teacher has been given authority by the administration or the board to call faculty meetings.
- All staff members are required by the Principal to be in their rooms by 8:15.

These problems were discussed with you and Ms. Strissel on Friday April 18, 1980. These are clear violations of administrative regulation and board policy. Further violations will lead to disciplinary action.

9. On or about May 2, 1980, outside school hours, Ms. Knippel gave en evaluation form identified by an association logo, to each of the teachers in the elementary building for them to use in evaluating Ms. Strissel's performance. The form was to be completed and returned to Knippel. The distribution was not done with the permission of Ms. Strissel or Mr. McRae. At about 10:00 a.m. Mr. McRae called Ms. Knippel in and asked her to retrieve the forms by the end of the day. As of 10:00 a.m. the following Tuesday she had not done so. McRae notified her there would be a formal disciplinary hearing in his office. The distribution of the form caused unrest among some of the teachers. Some of the teachers did not approve of the method by which the princi-

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pal was to be evaluated. There had been ill feelings toward Ms. Strissel by some of the teachers during the entire school year. 10. At 3:45 p.m. on May 14, 1980 Ms. Knippel, an MEA Uniserve Director and Mr. McRae net in his office at which time he gave her the following letter, dated May 9, 1980, from him: On the morning of Friday May 2, 1980, it came to my attention that Miss Knippel had given a Principals Evaluation form to each of the Elementary building staff for the purpose of evaluating Billie Strissol, the Elementary Principal... I find you to be in violation of the teachers agreement, the board policy on staff appraisal, and the following board policies: 232 Line and Staff Relations 323.3 Board - Staff Communications 323.32 Board Communications to Staff b . Circ. Prior to giving the Principal's Evaluation form to the staff, Ms. Knippel was reprinanded for two other violations. These violations show a definite lack of cooperation and cannot be tolerated. Based on the violation to date, I am putting you on probation for the remainder of the school year. If further violations of Board Policy occur, I will have no choice but to recommend to the board that you employment here be termi-At the same meeting Ms. Enippel gave Mr. McRae her rebuttal to the letter dated May 2, 1980, it reads: I called an HPEA meeting for April 16, 1980, to be held at the High School beginning at 3:45 p.m. In accordance with the 1979-1981, Professional Agreement, Article IV, ASSOCIATION AND TRACHER RIGHTS, Section 3, Use of Bulldings, which states: Scheduling the use of buildings and equipment shall be subject to approval of the building principal in advance of the time and place (emphasis added). This meeting was scheduled for 3:45 p.m., which Sec. has been a past practice in the school system for many years.

> B. Future meetings of the Association shall be held in accordance with the 1979-1981 Professional Agreement, which was sutually agreed to by the District and the Association on May 1, 1979.

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- II. Mr. McRae's allegations that I called a faculty meeting is in error. I, as President of the Huntley Project Education Association, called a legal Association meeting prior to the beginning of the school day. My right to call such a meeting is found in the 1979-1981 Professional Agreement under Article IV. Further, Montana statutes protect such Association activity as found in 39-31-201, MCA and 39-31-205 MCA.
- III. Finally, if the School District persists in trying to circumvent the 1979-1981 Professional Agreement as it pertains to the Huntley Project Education Association and/or its officers, we shall be forced to pursue 39-31-401 MCA.
- 11. In response to Ms. Enippel's above rebuttal statement Mr. McRae wrote another letter dated May 15, 1980 and put it in her file with a copy to her. It states:

I think we should keep the record straight relating to the two issues in my letter to you dated May 2, 1980.

In your letter of rebuttal dated May 14, 1980, you state you called a legal Association meeting. You did not obtain the permission of the building Principal, Billie Strissel to hold that meeting. You are in violation of the Teachers Agreement ARTICLE IV SECTION C.

When Ms. Strissel and I discussed this issue on April 18, I asked Miss Enippel if she had called a local M.E.A. meeting. Miss Enippel stated in front of a witness, Billie Strissel, that it was not an M.E.A. meeting and that the M.E.A. did not have anything to do with the meeting. Teachers in the other two buildings had not been informed that an H.P.E.A. meeting had been called for the morning of April 18, 1980. The Elementary staff understood it was a building faculty meeting.

12. The District adopted a policy a few years ago and placed it under the heading of "Professional Organizations" in the Policy Manual of the Huntley Project Schools, School District No. 24, Yellowstone County, Worden, Mont. Revised 8-7-78, 8-20-19. The policy states:

Absence from work for the purpose of taking part in activities of professional organizations shall require Board approval. Therefore, staff members who accept association offices and/or duties which will require their absence from school during working hours, or which otherwise will encreach

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upon the time they normally spend on their regular district assignments, are advised to seek Board approval before accepting such association offices or duties.

The policy has never been enforced.

- The same Policy Manual contains a provision prohibiting teachers from leaving the building to which they are assigned during basic duty day without first making arrangements with the principal for the absence. The Manual also expresses, in detail, the District's policy regarding teacher - principal - superintendent - board communications. It provides, in essence, that formal communication should be up the hierarchy through the proper channels (teacher. principal, superintendent, board) and down the hierarchy in the reverse fashion. The policy points out that appeals to decisions made by an administrative officer may be appealed "...through procedures established by the Board. These procedures are found in Section XIII of the negotiated agreement." Where District policy conflicts with provisions of the collective bargaining agreement, the school board Chairman believed that the contract controls.
- 14. The collective bargaining agreement between the parties provides, in pertinent part, the following:

GRIEVANCE PROCEDURE

A. Definitions

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- A grievance is defined as a complaint based on the conditions or circumstances under which a teacher works.
 - 6. Grievances within the scope of this agreement may be processed through binding arbitration.
 - b. Grievances outside the scope of this agreement may be processed through level 4, but may not be taken through binding arbitration.

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d. Decision: The decision by the arbitrator shall be rendered within thirty (30) working days after the close of the hearing. Decisions by the arbitrator in cases properly before him shall be final and binding upon the parties, as long as the decision does not violate any Montana laws and is within the terms and conditions of School District policy and this agreement.

IV. DISCUSSION

Of the several issues raised by these charges, as noted above, the first which should be decided is whether the Board of Personnel Appeals should defer to the contract grievance procedure. Unlike the National Labor Relations Board the BPA has not established principles for prearbitral deferral; however even if NLRB precedent were followed here, this is not the kind of case which fits the circumstances set forth under the Collyer doctrine. Collyer Insulated Wire 192 NLRB 837, 77 LRRM 1931 (1971). Among other things, the NLRB requires that the contract obligate each party to submit disputes to arbitration and that the arbitration clause be broad enough to embrace the dispute in question. Further, the contract and its meaning must be the center of the dispute. The contract between the parties to this dispute limits the binding force of the arbitrator's decision to those matters which do not violate District policy. The contract and its meaning do not lie at the center of this disagreement; the contract does not deal with, for example, the question of whether a teacher may evaluate a principal. Nor does it address the question of association violations of management's protected rights. Those reasons would be sufficient to decline deferral. However, the fact that both parties filed unfair labor practice charges and moved to have them consolidated for hearing and decision

coupled with the nature of the charges reinforces those reasons.

Three basic questions are raised by these charges, the answers to which will resolve all issues noted earlier.

First, was Ms. Enippel engaged in protected concerted activity when she called the April 16th and 16th meetings and when she distributed the evaluation? Secondly, does the District policy on seeking its approval before accepting association office interfere with the administration of the association or interfere, restrain or coerce the teachers in exercising their rights under 39-31-201 MCA? And third, did the Association violate 39-31-402(1) or (2) MCA by Ms. Enippel's distribution of an evaluation form and calling a meeting on April 18, 1980?

Public employees in Montana have the right to engage in concerted activities for the purpose of collective bargaining or other mutual and or protection. To interfere, restrain or cource them in the exercise of that right is an unfair labor practice. Public employers, on the other hand have the right to take disciplinary action for good cause related to maintaining order and efficiency in operations. Where there is a conflict between the employer's right to conduct the public's business and the employees' right to engage in concerted activities, one must balance their respective rights. With respect to the two meetings called by Ms. Enippel for which she received a warning letter; clearly, the employer's right to control the activities of its employees during the workday are supreme to an employee's right to hold a meeting during those working hours without permission. The Superintendent's admonition was varranted. He did not interfere with protected rights because there existed no right to neet during school hours unless proper

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permission was obtained. The warning letter dated May 2, 1980 did not change the parties negotiated egreement regarding the use of school buildings for Association meetings. All it did was require that meetings on school time be cleared with the principals. That requirement is reasonable, particularly in light of testinony explaining that principals need to know where the teachers are during the basic duty day. There is no evidence on the record that the District has attempted to control association meetings held outside normal work hours. The difference between an employer making certain demands if a meeting is to be held on company time and making those same demands if the meeting is on the employee's own time is significant.

When Superintendent McRae disciplined Ms. Knippel for distributing the evaluation form he interfered with her right to engage in concerted activities. That it upset Ma. Strissel and disrupted her style of management must be discounted when weighted against Ms. Knippel's right to engage in concerted action. The question is a very simple one, should a labor organization, acting through its officers, have the right under 39-31-201 MCA to discuss and express opinions about supervisors? I believe the purposes of the Act are best promoted by answering in the affirmative. To hold otherwise would seriously impede their right to express disfavor over conditions of employment - conditions over which first line supervisors have considerable control and influence. The evaluation was an internal union tool to be used to attempt to arrive at a consensus of teacher opinion on Ms. Strissel's performance in a position which had significant impact on teacher working conditions. No one would deny that the Association, acting through its president, has every right to survey its members concerning

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their opinions on school board candidates. For like reasons they are entitled to refine and express a consensus of opinions on their supervisor's abilities. Whether the District chose to credit or discredit such opinion would have been its decision.

The NLRB has held that employees have the right to distribute union material on company property. Republic Aviation v. NLRB 324 U.S. 793 (1945), 16 ERBM 620. The Board of Personnel Appeals, because of the similarity of the Mational Labor Realtions Act and the Montana Collective Bargaining for Public Employees Act, has been quided by NERB precedent. In deciding whether there has been a violation of an employee's rights under Section 8(a)(1) of the NLRA, the MLRB does not look to employer motive. The test is whether the employee's conduct tends to interfere with free exercise of employee rights under the Act. Cooper Thermometer Co., 154 NLRB 502, 59 LRRM 1767 (1965). In the instant case the distribution of the form did not interfere with teacher duties and was done on their own time. That Ms. Strissel was offended is insufficient reason to deny Ms. Knippel and other teachers their right to engage in concerted activities for their mutual aid. Here, the employer's conduct can be termed "inherently destructive" of the employees' rights under 39-31-201 MCA; therefore, no affirmative showing of unlawful motivation was necessary. MLRB v. Great Dane Trailers, Inc., 388 U.S. 26, 65 LRRM 2465 (1967).

It is an unfair labor practice under 39-31-401(2) MCA for a public employer to dominate, interfere or assist in the formation or administration of a labor organization.

The language of the Montana Act is the same as Section 8(a) (2) of the NLRA. The question raised by the Association is whether the District's policy on seeking its approval prior

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to sembers taking Association office or duties interferes with the administration of the Association.

It is not clear from the language of the policy that a teacher must obtain approval of the District before accepting office. If such were the case, it would amount to interference. Hydro-Dredge Accessory Co., 215 NLRB 5, 87 LRRM 1557 (1974). However, it appears that the policy only requires approval of the time off from duty required and even them teachers are advised to seek approval. There is no clear requirement that a teacher must have the School District's stamp of approval before holding an Association office. Also, the testimony of the School Board chairman showed there was no intent to require that teachers get approval prior to holding Association office. He also testified the policy has not been enforced. There is sufficient anniquity in the language of the policy to render it meaningless. There is no violation of either 39-31-401(1) OF (2) MCA.

The School District urges that the Montana Constitution and statues vest the supervision and control of its affairs in the Board of Trustees. One cannot dispute that proposition if it is qualified to say the supervision and control must be exercised within the limits prescribed by Title 39, Chapter 31. If the supervision and control of the District's business; even with respect to wages, hours, fringe benefits and other conditions of employment; have no limitations, the Collective Bargaining for Public Employees Act has little or no meaning. If, in the name of supervision and control, an employer is permitted to encroach upon employee rights under 39-31-201 MCA, all basic collective bargaining for public employees would be voided. The charge that the distribution of the evaluation form violated management policies, inter-

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ferred with employer rights and amounted to a refugal to bargain in good faith must be dismissed. The use of the evaluation form was protected concerted activity. Whether it violated District policy is immaterial. If it did in fact violate policy, the policy is wrong and infringes upon basic employee rights under Section 201. Unilaterally adopted policies cannot be utilized to interfere with employee rights. Section 39-31-402(2) NCA makes it an unfair labor practice for a union or its agent to refuse to bargain collectively in good faith with the employer. There is no evidence on the record to show a refusal to bargain. There was no request to bargain. When an employer is displeased with employee conduct, his recourse lies in disciplinary procedures, provided such conduct is not protected. An employer has all the rights he needs to impose discipline. except those bargained away or those found in the statute.

The calling of the meetings on school time and without permission of the proper supervisory personnel, as noted above, was not an actaivity which the employer could not prohibit. It did so and issued a warning letter to Ms.

Knippel. But, Ms. Knippel's conduct did not violate 39-31-402 MCA. There was no refusal to bargain; there was no restraining or coercion of the employer in selecting its representative.

The distribution of the evaluation form was an activity protected by the Act and could not, therefore, constitute a violation of management's rights. Unfair labor practices are those matters enumerated in 39-31-401 and 402 MCA. Ford v. University of Montana, 598 P. 2d 604 (1979).

V. CONCLUSION OF LAW

 The District did not violate 39-31-401 MCA by reprinanding and issuing a warning letter to Ms. Knippel for

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calling the April 16 and 18, 1980 teacher meetings.

- The District did violate 39-31-401(1) NCA by disciplining Ms. Knippel for distributing the evaluation form.
- 3. The District did not violate 39-31-401 MCA by requiring that meetings on school time be cleared with the principals of three buildings.
- 4. The District did not violate 39-31-401, MCA by adopting a policy advising the Association to obtain its approval for time off from work to participate in professional activities.
- 5. The Association did not violate 39-31-402 MCA by the action of Ms. Knippel in distributing the evaluation form. Interference with managements rights under 39-31-303 MCA do not constitute unfair labor practices per se.
- 6. The calling of the April 16 and 18, 1980 meetings by Ms. Enippel did not constitute a violation of 39-31-402 MCA.
- 7. The Board of Personnel has properly exercised its powers under 39-31-403 MCA by declining to defer these charges to the contract grievance procedure.

VI. RECOMMENDED ORDER

IT IS ORDERED, after this Order becomes final, the Huntley Project School District No. 24, its officers, agents and representatives shall:

- Cease and desist its violation of 39-31-401 MCA, and
- Remove from the personnel file of Ms. Knippel the memorandum dated May 9, 1980 which placed her on probation.

IT IS FURTHER ORDERED that all other charges in this matter be dismissed.

VII. NOTICE

Exception to these Findings of Fact, Conclusions of Law and Recommended Order may be filed within twenty days service thereof. If no exceptions are filed, the Recommended Order shall become the Final Order of the Board of Personnel Appeals. Address exceptions to: Board of Personnel Appeals, Capitol Station, Helens, Montana 59601.

Dated this 27/4 of February, 1981.

BOARD OF PERSONNEL AFEALS

JACK H. CALHOUN Hearing Examiner

CERTIFICATE OF MAILING

The undersigned does certify that a true and correct copy of this document was mailed to the following on the

Enilie Loring HILLEY & LORING, P.C. 1713 Tenth Avenue South Great Falls, Montana 59405

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DAVIDSON, VEEDER, BAUGH, BROEDER & POPPLER, P.C.
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Jennifer Jacolicons

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